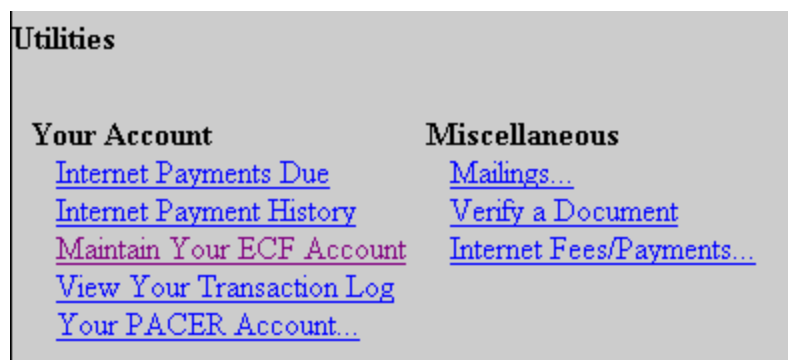# CM/ECF Maintain User Accounts

All CM/ECF users will be given a user login and password, and access to maintain their own account information through **Maintain Your ECF Account**. Using this option, users can update their name, mailing and e-mail addresses, e-mail preferences, phone and fax numbers, and password. Users can therefore control the accuracy of their own information in a timely manner.

The lesson on this module will show how a user can modify:

- ? User name, address & telephone numbers
- ? Email information
- ? Electronic noticing preferences
- ? User login and passwords

1. To access these functions, go to **Utilities** on the CM/ECF Main Menu bar.

Bankruptcy	•	Adversary	•	Query	•	Reports	•	Utilities	•	Logout

2. Under the **Your Account** category, select **Maintain Your ECF Account**.

Utilities

Your Account
Internet Payments Due
Internet Payment History
Maintain Your ECF Account
View Your Transaction Log
Your PACER Account...

Miscellaneous
Mailings...
Verify a Document
Internet Fees/Payments...

3. The Maintain User Account screen appears.

At the user account screen, the user **CAN** update or change the following:

? Last, First and Middle name
? Generation (Sr., Jr., II, III, etc.)
? Office Name
? Address 1 and 2 – NOTE: Address 3 is an invalid field
? City, State or Zip
? Country or County
? Phone & Fax numbers

The user **CANNOT** update or change the following. If these items need updating, the user must contact the court.

? Bar ID number
? Bar Status
? Date of Birth

The following items are for court use only:

? Mail Group
? Initials
? AO Code
? Person End Date

Update your personal information on this screen. When it is correct, click **Submit** to save the changes. If the **Submit** button is not used, the record will not be modified.

The **Email information** and **More user information** buttons provide further screens to modify your user profile.

4.   The Email Information screen presents options for control of your electronic notification for the CM/ECF system.

E-mail information for Andrea Redmon
        Primary e-mail address andrea_redmon@oknb.uscourts.gov

Send the notices specified below
    ☑ to my primary e-mail address

    ☐ to these additional addresses

☑ Send notices in cases in which I am involved
☐ Send notices in these additional cases

⦿ Send a notice for each filing
◯ Send a Daily Summary Report

Format notices   ⦿ html format for Netscape or ISP e-mail service

                  ◯ text format for cc:Mail, GroupWise, other e-mail service

    Return to Account screen   Clear

You may request Email copies of notification on all cases to which you are a party or only on specific cases. You can receive Email activity throughout the day or a daily summary of all noticing activity. "All activity" includes notification of claims as well as other entries to a case.

Each Email will include the case number and name of the docket entry in the subject line of the mail message.

5.   **Primary Email address**. This address must be formatted to Internet protocol or an error will be generated. It may be prudent to establish a separate Email account for CM/ECF activity from your routine Email correspondence.

6. Send the notices specified below

? **To my primary Email address**
To activate CM/ECF notification you must first check the box next to your E-mail address.

? **To these additional addresses**
You may have notices sent to other Email addresses besides your primary Email address. (Paralegals or other staff may want to share this notification activity.) When entering multiple Email addresses, separate each address with a comma.

? **Send notices in cases in which I am involved**
Checking this box will automatically inform the user when any filing has been submitted in a case where this person is a participant.

? **Send notices to these additional cases**
You do not have to be a participant in a case to receive notification of activity. Trustees and attorneys can elect to be notified of activity in cases in which they have an interest but are not parties to the case. It is possible to select both options.

NOTE: This list is maintained by each user. As you are involved in more cases or as cases close, you must update this screen.

7. Send a notice for each filing

Checking this box means you will receive E-mail notices when activity occurs throughout the day to the account(s) specified above. The title of the Email will describe the type of filing and the case number.

8.   Send a Daily Summary Report

A comprehensive list of one day's activity can be sent once a day. Notifications for claims will also be included in this mail list.

A Summary report includes the case numbers and titles of cases in which activity occurred for that day. The text of the Summary Email notification will display the docket event and the document number (including the hyperlink).

NOTE: You cannot elect to receive both separate notices and the summary report.

9.   Format notices

Enter the Email delivery method. This selection will be determined by your Email type.

? **html format for Netscape or ISP Email service**
The html format will include hyperlinks to the document or claim.

? **text format for cc:Mail, GroupWise, other E-mail service**
Text format will feature the URL of the PDF document which can be copied and pasted into the location bar of your browser.

10. When you have entered your Email preferences, click on **Return to Account screen**.

11. Click on **Submit** to save the changes.

12. The **SELECT THE CASES TO BE UPDATED** screen will then appear for the user to select the effected cases. If you modified name, SSN or Tax ID on the previous screen, the new values will be recorded for ALL cases to which you are linked. Modifications of other items will be recorded ONLY for those cases you select on the below screen.

13. Select the desired cases and then click on **Submit**.

14. A confirmation screen will appear. If you checked any of the boxes for sending notices for each filing, or sending a Summary report, this screen will indicate the option is turned "on".

Any additional case numbers (and hyperlinks) will be displayed under the **Case list:** heading. If invalid case numbers were entered, you will receive an error message after submitting the data and be given the chance to back up and enter a valid number.

15. If you click on the **More user information** button from your account screen, your login and password information will be displayed.

Maintain User Account

Last name	Redmon
First name	Andrea

Middle name [ ]   Generation [ ]

Title [ ]   Type aty

Office [Law Office of A&R]

Address 1 [200 S. Boulder Ave.]

Address 2 [ ]

Address 3 [ ]

City [Tulsa]   State [OK]   Zip [74103]

Country [ ]   County [ ]

Phone [918-699-4050]   Fax [ ]

SSN [ ]   Tax Id [ ]

Bar Id 81169   Bar status   Mail group

Initials   DOB   AO code   Person end date

[Email information...]   [More user information...]

[Submit]   [Clear]

More User Information for Andrea Redmon

Login [redmona]   Last login 10-20-2003 16:23

Password [**********]   Current login 10-28-2003 16:23

Prid 20   Create date 09/02/2003

Registered Y   Update date 09/02/2003

Internet Credit Card Y

Groups Attorney

[Return to Account screen]   [Clear]

16. You may change your own login and/or password.
    Remember:
    ? Logins and passwords are case sensitive
    ? These are alphanumeric fields
    ? Passwords have a maximum of 8 characters

? When you enter a new password it is displayed on the screen. Your subsequent queries to this screen will show only asterisks.

? The court will not be able to tell you what your password is. If you forget your password, please contact the court and a new password will be issued.

17.	Enter in the appropriate information and click on **Return to Account screen**.

18.	Your user account screen will appear again.

Maintain User Account

Last name Redmon		**First name** Andrea	
Middle name		**Generation**	
Title		**Type** aty	
Office Law Office of A&R			
Address 1 200 S. Boulder Ave.			
Address 2			
Address 3			
City Tulsa		**State** OK	**Zip** 74103
Country		**County**	
Phone 918-699-4050		**Fax**	
SSN		**Tax Id**	

Bar Id 81169   Bar status   Mail group

Initials   DOB   AO code   Person end date

Email information...   More user information...

Submit   Clear

19.	The **SELECT THE CASES TO BE UPDATED** screen will then appear for the user to select the effected cases. If you modified name, SSN or Tax ID on the previous screen, the new values will be recorded for ALL cases to which you are linked. Modifications of other items will be recorded ONLY for those cases you select on the below screen.

Searching for existing Attorney Records
Select the cases to be updated

CAUTION: If you modified name, SSN, Tax ID, or Bar ID on the previous screen, the new values will be recorded for ALL cases to which the person is linked. Modifications of other items will be recorded ONLY for those cases you select below. Click the question mark on the menu bar above for more information.

```
*** Update All ***
2003-01026-DLR Lollara v. Smith
2003-01026-DLR Lollara v. Smith
2003-01031-TLM Brown v. Dardenne
2003-01034-DLR Miller v. Brown
2003-01040-TLM McGraw v. Beaver
2003-01079-DLR Brown v. Blow
2003-01100-DLR GMAC v. Cooper
2003-01100-DLR GMAC v. Cooper
2003-01103-DLR GMAC v. Blow
```

Submit   Clear

20.   If you would like this new information to apply to all of the cases, click on ***Update All*** at the top of the list. To change information only on certain cases, hold down the **[Control]** key after selecting the first case number and click on the others, one at a time, to highlight them.

21.   When you have all of the desired cases or ***Update All*** highlighted, click **Submit** to apply the new information.

22.   The system will update the records and inform you that they were updated. You may then click on another selection in the **CM/ECF Main Menu Bar**.